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Session 2:

VA TMS Training for Scheduling Managers, Assignment Managers, and Registration Managers

VA TMS Administrators
Role-Based Training

Virtual Instructor-Led Training

Participant Guide

April 2014

Table of Contents

1.0 About This Training

1.1 *Training Purpose*

The purpose of the VA TMS Administrators Role-Based Training Session 2: VA TMS Training for Scheduling Managers, Assignment Managers, and Registration Managers is to review concepts, define key terminology, and practice processes associated with scheduling instructor-led items in the VA TMS.

1.2 *Target Audience*

This session is intended for VA TMS administrators responsible for creating and modifying scheduled offerings and classes in the VA TMS. It is a requirement for the following target audience:

- Scheduling Managers
- Assignment Managers
- Registration Managers

1.3 *Training Length*

This training will run for approximately 3.5 hours. Brief breaks will be given.

1.4 *Participant Guide*

This Participant Guide contains all key content presented in this training, including PowerPoint slides with room for taking notes, activities, and demonstrations for each lesson.

The Participant Guide is divided into two sections:

- About This Training
- Training Content

NOTE: Print a hardcopy of this Participant Guide to use during training. You will need to reference the steps for all demonstrations and activities in this guide while completing steps in the VA TMS.

1.4.1 Participant Guide Icons

Icons	Description
	This icon indicates that there will be a demonstration conducted by the instructor within the VA TMS.
	This icon indicates that participants will complete an activity.
	This icon indicates that there is a job aid available for the task.

1.5 *Participant Preparation and Guidelines*
1.5.1 Requirements

Participants must complete the following for this training:
- Register for training through the VA TMS.
- Print a hardcopy of this Participant Guide for use during the training. It will be difficult to access electronically during training.

1.5.2 Demonstrations and System Practice Activities in VA TMS

During this training, you will observe instructor demonstrations and complete system practice activities within the VA TMS. These demos and activities will allow you to study and apply what you've learned about the features, functions, and processes critical to your role within the VA TMS. The steps for each demonstration and system practice activity have been provided in this guide so you can follow-along. You may also want to reference these steps after the training.

1.5.3 Virtual Instructor-Led Training Guidelines

This training will be delivered as a Virtual Instructor-Led Training (VILT) using a Web conferencing software program. You will need a computer and phone with speakers or headset in order to participate in this training. Follow the guidelines below to ensure the best training experience:

- Print a hardcopy of the Participant Guide for use during training.
- Be sure to log in to the Web conferencing software and dial in to the conference line 5 – 10 minutes early.

- Mute your phone line for the duration of the training session unless otherwise instructed.
- Use the chat feature for any questions during the session.
- The instructor may be able to answer your question immediately. Otherwise, he or she will answer at the end of the training, or send an e-mail afterward.

1.6 *VA TMS Administrators Role-Based Training Sessions and Target Audiences*

The table below includes a list of all training sessions in this training series, along with the target audience.

Session	Required for	Recommended for
Session 1: Introduction to VA TMS for All Administrators and Help Desk and Reports Managers	- Help Desk (as stand-alone training - Reports Managers (as stand-alone training) - Assignment Managers - Scheduling Managers - Registration Managers - Domain Managers - Learning Managers - Item Managers - AP Managers	n/a
Session 2: VA TMS Training for Scheduling Managers, Assignment Managers, and Registration Managers	- Assignment Managers - Scheduling Managers - Registration Managers	- Domain Managers - Learning Managers - Item Managers - AP Managers
Sessions 3–5: VA TMS Training for Domain Managers, Learning Managers, and Item Managers	- Domain Managers - Learning Managers - Item Managers	n/a

NOTE: Sessions 6-10 are advanced topics that are optional for managers who already have experience using the VA TMS.

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1.7 VA TMS Functions and Associated Roles

NOTE: Gray columns indicate add-on roles; white columns indicate stand-alone roles.

VA TMS Admin Function	LM	DM	IM	RM	SM	AM	APM	HD	PR	QEM	OM	CIM	HR	RPT	AHN	PM	COM	ACM	MSE	MSEHD
Unlock User Accounts	x							x	x											
Reset User Passwords	x							x	x											
Change Supervisors for a group of Users	x																			
Proxy into Users accounts	x							x												
Add/Remove Items to/from Learning Plan	x					x														
Add/Remove Curricula Assignments	x					x														
Record Item/External Event/Scheduled Offerings	x			x																
Edit/Delete Recorded Learning Events	x			x																
Merge User Records		x																		
Add/Edit Items	x		x																	
Add/Edit Curricula	x		x																	
Send Notifications	x														x					
Add/Edit Scheduled Offerings	x				x															
Register Users into a Scheduled Offerings	x			x	x															
Edit User's Registration in Scheduled Offerings	x			x	x															
Assign/Remove Competency Profiles to/from Users											x									
Assign/Remove Competencies to/from Users											x									
Manage Administrator Accounts		x																		
Add/Edit/Copy/Delete Assignment Profiles							x													
Edit User Preferred Accreditations	x							x										x		
Edit User Occupational Categories	x							x										x		
Add/Edit/Delete Competencies											x									
Add/Remove Competencies from Items												x								
Add/Edit/Delete Competency Profiles											x	x								
Enter/Delete Competency Assessments for Users	x			x		x					x	x								
Add/Edit/Delete Questions										x										
Add/Edit/Delete Exam Objects										x										
Assign/Remove Questions to/from Exam Objects										x										
Add Questionnaire/Surveys										x										
Unassign a Survey from Users	x																			
Edit Organization Dashboard Ownership		x																		
Add/Edit Accreditations																		x		
Apply Accreditations to Items																	x			
View sensitive information on Users Records													x							
Create and Manage Communities																	x			
Run various Standard and Custom Reports	x		x										x	x					x	
View Self Enrolled User	x		x					x											x	
Validate Self Enrolled User																			x	
Bookmark Available Entries	x		x	x	x	x		x	x		x	x	x	x		x	x	x	x	x
Download Search Results	x		x	x	x	x	x	x	x	x	x	x	x	x		x	x	x	x	x

2.0 Training Content

2.1 *Welcome*

Notes:

Slide 1: Session Preparation

Notes:

Slide 2: VA TMS Administrators Role-Based Training

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Session Agenda

- Welcome and Introductions
- Lesson 1: Scheduled Offerings
- Lesson 2: Segments
- Lesson 3: Registration
- Lesson 4: Record Learning Events
- Question and Answer

Slide 3: Session Agenda

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Session Objectives

At the end of this session, you should be able to:

- Create a scheduled offering of an instructor-led item
- Add, copy, and revise segments of scheduled offerings
- Manage resources for segments of scheduled offerings
- Use the Record Learning tool to record completed learning for users

Slide 4: Session Objectives

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Introductions

- Name
- Division of VA
- Experience with VA TMS
- Personal training goal

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Session 5: Introductions

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2.2 Lesson 1: Scheduled Offerings

Notes:

Slide 6: Lesson 1: Scheduled Offerings
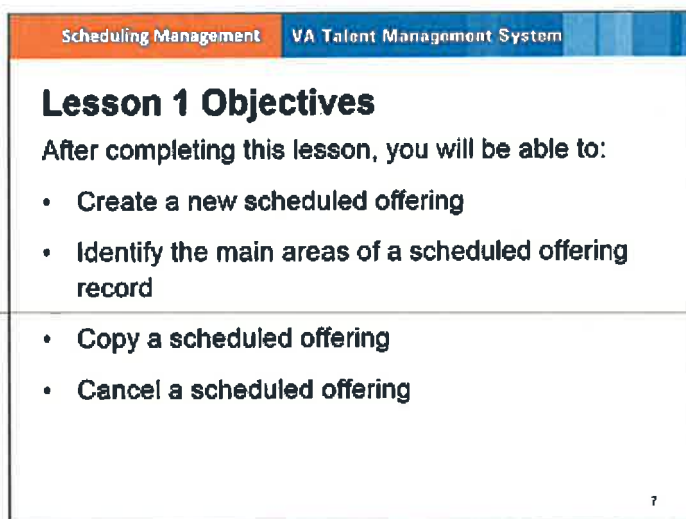
Notes:

Slide 7: Lesson 1 Objectives

Scheduling Management

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Scheduling Management

Scheduling management is a term used to describe the process of creating scheduled offerings within the VA TMS for instructor-led/blended items or schedule blocks.

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Slide 8: Scheduling Management

Scheduling Management

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Scheduled Offering

Scheduled offerings are scheduled items used to manage resources, user registration, and course duration.

- Places an instance of the item on the calendar
- Allows resources to be associated to it
- Allows users to be registered into it

After creating instructor-led/blended items, the next step is to schedule them for a specific date, time, and location in order to track user registration.

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Slide 9: Scheduled Offering

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Ways to Add a New Scheduled Offering

1. Add Scheduled Offering Quick Link

2. Learning > Scheduled Offering > Add New

3. Add Scheduled Offering in the Search field

4. From the Item Record, choose "Schedule" in the Actions area

Slide10: Ways to Add a New Scheduled Offering

Ad Hoc Facilities

- Scheduled offerings now support the assignment of an ad hoc facility for those offerings scheduled to take place at an external facility (e.g. hotel conference room).

- This is ideal when training is scheduled at locations that are not available as system records for re-use.

Slide 11: Ad Hoc Facilities

Slide12: Add New Scheduled Offering

Slide 13: Enter Ad Hoc Facility

Slide14: Delete Ad Hoc Facility

Preferred Region and Facility

- Users can now enter a preferred region and facility when requesting a scheduled offering.

- When region is selected, the facility list will default to those facilities in the selected region.

- No defined regions in VA TMS -- admins will need to identify and enter the information.

- Admins should **not** enable requests unless really necessary.

Slide 15: Preferred Region and Facility

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Slide16: Preferred Region – User View

Notes:

Slide 17: Enable User Requests – Admin View

Notes:

Slide18: Item Requests Report

Slide 19: Filter Requests

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Equipment Search Defaults

- Equipment search defaults to location/facility on Add Scheduled Offering page.

- If equipment is not associated with the location/facility, all records will show unless there are domain restrictions.

- This feature will behave as it did in the past.

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Slide 20: Equipment Search Defaults

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New Equipment Search Criteria

New search criteria is now available for equipment when adding a scheduled offering:

- **Availability** (can choose if available for entire offering)

- **Include Free Floating** (not associated with any other resources)

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Slide 21: New Equipment Search Criteria

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Slide 22: Search Equipment – Version B1305

Slide 23: Search Equipment – Version B1311

Slide 24: Add New Scheduled Offering

Notes:

Demonstration: Add New Scheduled Offering

1. Log in to the VA TMS.
2. Verify that the **Admin** tab is selected.
3. Select the **Learning** tab.
4. Select **Scheduled Offerings** tab on the left-hand side of the screen.
5. Select **Add New.** This opens the **Add New Scheduled Offering** window.
6. Select the **Item type** radio button.
7. Select the **Item ID magnifying glass** icon to search for the item to schedule.
8. Select an item from your search results.
9. Enter a **description** for this scheduled offering.
10. Specify a **domain** for the scheduled offering.
11. Check the **Publish in all associated catalogs** checkbox. **NOTE:** If you select the Publish in all associated catalogs checkbox, when you save the new scheduled offering the system automatically adds this new scheduled offering to every catalog that the item already belongs to. This makes the scheduled offering visible and possibly available for users to self-register.
12. Select a **start date, start time,** and **time zone. NOTE:** The scheduled start date and time and the scheduled end date and time will appear below the scheduled information.
13. Select **Preview** to view the basic information for the offering (Optional).
14. Select the **drop-down menu** next to the plus sign by **Facility.**
15. Select **Enter Ad Hoc Facility.**
16. Enter information for the ad hoc facility on this page.
17. When you are finished, select **Save.**
18. Select **Apply Changes.**
19. Select "X" in the upper right-hand corner to return to the Add Scheduled Offering page.
20. You can remove what was added by selecting the link to the ad hoc facility and then selecting **Delete.**
21. If applicable, select the other resources associated with the scheduled offering: **location, instructor,** and **equipment.** Show the new equipment search criteria.
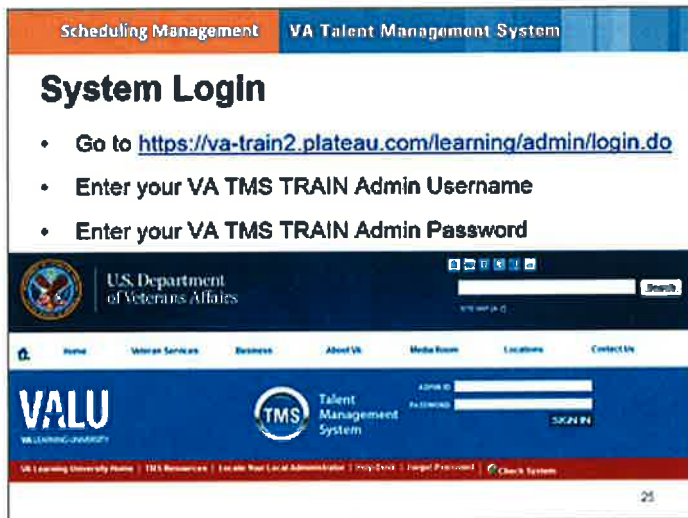
    NOTE: Alerts are displayed if there are any resource conflicts. Depending on the item

configuration, an alert may also display if the selected instructor is not authorized to teach the item.

22. Select **Save**.

23. If there are any warnings, the **Warning Details** screen displays. If this occurs, select **Yes** to continue.

24. The Schedule Offering record displays allowing you to make further configurations.

25. For use in future activities, record the system-generated **Scheduled Offering ID**, which is the numeric value located in the upper right corner of the Core area.

The Job Aid: Creating Scheduled Offerings is available in the VA TMS.

Slide 25: System Login

Slide 26: Activity #1: Add New Scheduled Offering

Activity #1: Add New Scheduled Offering

1. Log in to the VA TMS.
2. Verify that the **Admin** tab is selected.
3. Select the **Learning** tab.
4. Select **Scheduled Offerings** tab on the left-hand side of the screen.
5. Select **Add New**. This opens the **Add New Scheduled Offering** window.
6. Select the **Item type** radio button.
7. Select the **Item ID magnifying glass icon** to search for the item to schedule.
8. Select an item from your search results.
9. Enter a **description** for this scheduled offering.
10. Specify a **domain** for the scheduled offering.
11. Check the **Publish in all associated catalogs** checkbox. **NOTE:** If you select the Publish in all associated catalogs checkbox, when you save the new scheduled offering the system automatically adds this new scheduled offering to every catalog that the item already belongs to. This makes the scheduled offering visible and possibly available for users to self-register.
12. Select a **start date**, **start time**, and **time zone**. **NOTE:** The scheduled start date and time and the scheduled end date and time will appear below the scheduled information.
13. Select **Preview** to view the basic information for the offering. (Optional)
14. Select the **drop-down menu** next to the plus sign by **Facility**.
15. Select **Enter Ad Hoc Facility**.
16. Enter information for the ad hoc facility on this page.
17. When you are finished, select **Save.**
18. Select **Apply Changes.**
19. Select "**X**" in the upper right-hand corner to return to the Add Scheduled Offering page.
20. You can remove what was added by selecting the link to the ad hoc facility and then selecting **Delete**.
21. If applicable, select the other resources associated with the scheduled offering: **location, instructor,** and **equipment**. View the new equipment search criteria.

    NOTE: Alerts are displayed if there are any resource conflicts. Depending on the item configuration, an alert may also display if the selected instructor is not authorized to teach the item.
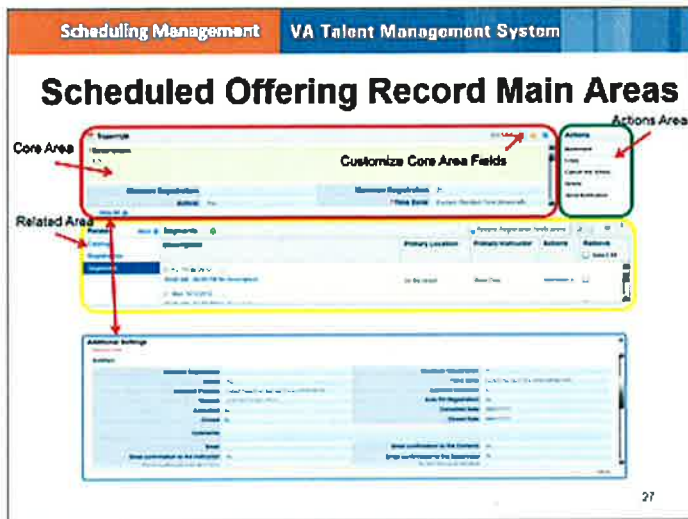
22. Select **Save**.

23. If there are any warnings, the **Warning Details** screen displays. If this occurs, select **Yes** to continue.

24. The Schedule Offering record displays allowing you to make further configurations.

25. For use in future activities, record the system-generated **Scheduled Offering ID**, which is the numeric value located in the upper right corner of the Core area.
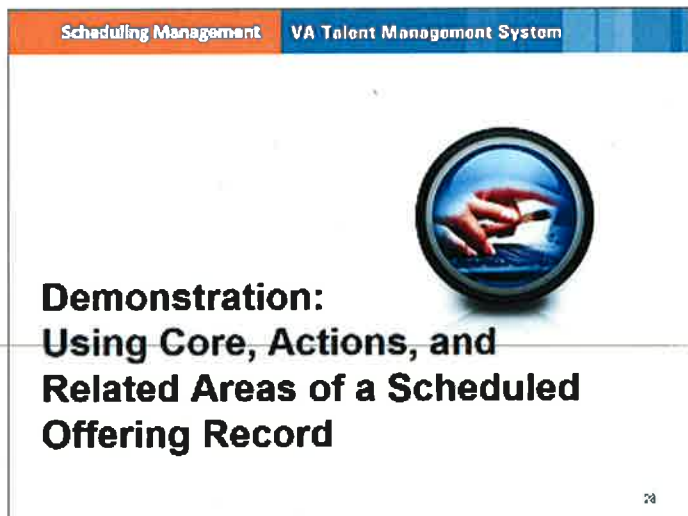

The Job Aid: Creating Scheduled Offerings is available in the VA TMS.

Slide 27: Scheduled Offering Record Main Areas

Slide 28: Demonstration: Using Core, Actions, and
Related Areas of a Scheduled Offering Record

Demonstration: Using Core, Actions, and Related Areas of a Scheduled Offering Record

1. Log in to the VA TMS.
2. Verify that the **Admin** tab is selected.
3. Select the **Learning** tab.
4. Select **Scheduled Offerings** tab on the left-hand side of the screen.
5. Select **Search.**
6. Select a scheduled offering from the list of results.
7. Once the scheduled offering record is displayed, describe the three main areas of the scheduled offering record as follows:

Core Area, located in the upper part of the scheduled offering

You can use the Core area of the selected scheduled offering record to update the basic attributes of the record (summary information). These attributes could include, for example, the offering description, domain, facility, registration settings, and any other fields deemed required by the global system administrators or added based on your Personalized field preferences.

Select the **View All** link to see additional settings for the scheduled offering, including title, description, summary, extended summary, physical schedule, and registration.

Actions Area, located to the right of the Core Area

In the Actions area, you can bookmark, copy, cancel, or delete a scheduled offering. You can also send notifications to users about scheduled offerings. If you select the **View Roster** link, this quickly generates the Roster/Sign-In Sheet report that shows all of the users who are enrolled for that scheduled offering.
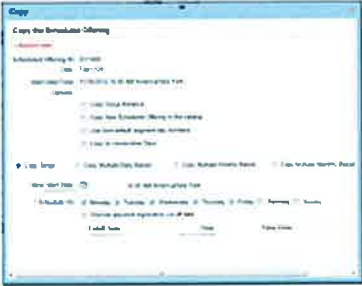
Related Area, located to the left of the Core Area

The Related area contains additional information regarding the scheduled offering, including registration information, associated catalogs, and segment details.

Copy a Scheduled Offering

- Allows you to create duplicates
- Copies resources and registration parameters
- Can be scheduled to occur once or in recurrence

Notes:

Slide 29: Copy a Scheduled Offering

Demonstration: Copying and Canceling Scheduled Offerings

Notes:

Slide 30: Demonstration: Copying and Canceling Scheduled Offerings

Demonstration: Copying and Canceling Scheduled Offerings

Copying a Scheduled Offering

1. Log in to the VA TMS.
2. Verify that the **Admin** tab is selected.
3. Select the **Learning** tab.
4. Select **Scheduled Offerings** tab on the left-hand side of the screen.
5. Search for and select a scheduled offering.
6. Select the **Copy** link in the Actions area of the record.
7. Select the **Copy Multiple–Monthly Based** radio button.
8. Enter a new start date in the **New Start Date** textbox.
9. Enter **"1"** in the Schedule every ___ month(s) field.
10. Select the **End after ___ schedules** radio button.
11. Enter **"3"** in this field.
12. Check the **Include Registration Cut-off Date** checkbox.
13. Select **Next**.
14. On the Confirmation screen, check the **Send Notification** checkbox.
15. Select **Copy**. Note the new scheduled offering IDs and start dates.

Canceling a Scheduled Offering

1. Enter search criteria to search for and locate one of the scheduled offerings just copied.
2. Select **Cancel** from the Actions area of the Scheduled Offering record.
3. Select **Next.**
4. Admins don't need to complete **Step 2: Edit Realized Costs** because this feature is not currently available in the VA TMS.
5. Select **Inactivate the Scheduled Offering**.
6. Select **Next** again.
7. On the Confirmation screen, select **Finish.**
8. On the Finished Confirmation Page, select **OK.**

Slide 31: Activity #2: Copy and Cancel Scheduled Offerings

Activity #2: Copy and Cancel Scheduled Offerings

Copy a Scheduled Offering

1. Log in to the VA TMS.
2. Verify that the **Admin** tab is selected.
3. Select the **Learning** tab.
4. Select **Scheduled Offerings** tab on the left-hand side of the screen.
5. Search for and select a scheduled offering.
6. Select the **Copy** link in the Actions area of the record.
7. Select the **Copy Multiple–Monthly Based** radio button.
8. Enter a new start date in the **New Start Date** textbox.
9. Enter **"1"** in the Schedule every ___ month(s) field.
10. Select the **End after ___ schedules** radio button.
11. Enter **"3"** in this field.
12. Check the **Include Registration Cut-off Date** checkbox.
13. Select **Next**.
14. On the Confirmation screen, check the **Send Notification** checkbox.
15. Select **Copy**. Note the new scheduled offering IDs and start dates.

Cancel a Scheduled Offering

1. Enter search criteria to search for and locate one of the scheduled offerings just copied.
2. Select **Cancel** from the Actions area of the Scheduled Offering record.
3. Select **Next**.
4. Admins don't need to complete **Step 2: Edit Realized Costs** because this feature is not currently available in the VA TMS.
5. Select **Inactivate the Scheduled Offering**.
6. Select **Next** again.
7. On the Confirmation screen, select **Finish**.
8. On the Finished Confirmation Page, select **OK**.

Knowledge Check

A scheduled offering is:

a) An instance of an item placed on a learning calendar
b) An assignable unit that a user must complete
c) A grouping of curricula
d) None of the above

Notes:

Slide 32: Knowledge Check

Knowledge Check

What are the main areas of a scheduled offering record?

a) Home, Learning, and Status
b) Curricula, Actions, and Records
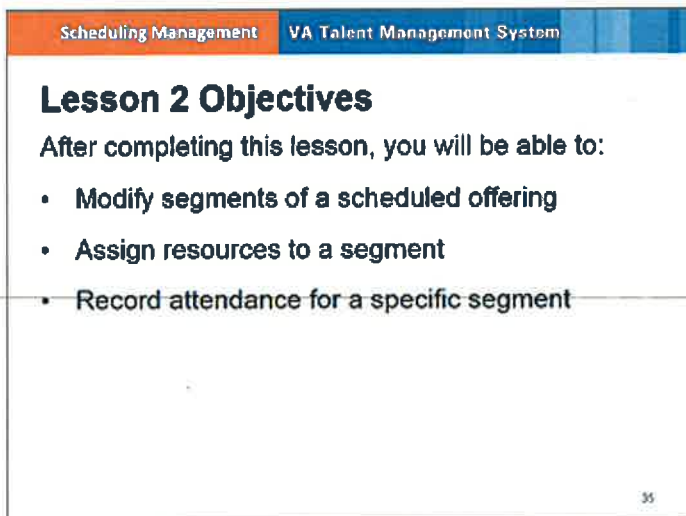c) Home, Items, and Related
d) Core, Actions, Related

Notes:

Slide 33: Knowledge Check

2.3 *Lesson 2: Segments*

Slide 34: Lesson 2: Segments

Notes:

Slide 35: Lesson 2 Objectives

Notes:

Slide 36: Segments

Slide 37: Two Views in the Segment Section

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List View

- Lists all segments and assigned resources in text format
- The only view in which segments can be copied
- The only view in which an admin can record attendance

Slide 38: List View

Notes:

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Calendar View

- Shows segments in graphical calendar format
- Segment times and dates can be altered by dragging and resizing segment boxes
- View can be altered to reflect day, week, or monthly view

Slide 39: Calendar View

Notes:

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Resources Assigned to Segments

- A segment can have multiple resources of the same type, such as two instructors

- Once a resource is assigned to a segment, it is booked

- If another admin attempts to schedule the resource during the same timeframe, VA TMS will alert him/her that there is a conflict

Slide 40: Resources Assigned to Segments

Notes:

Adding Resources to a Segment

You can set up scheduled offering resources in the VA TMS. Resources include:

- Instructors

- Equipment

- Materials

- Facilities

- Locations

Slide 41: Adding Resources to a Segment

Notes:

Slide 42: Custom Resources Search Default

Slide 43: Add Custom Resource

Record Attendance

- To record a user's attendance for a segment, select the Attendance link in the Actions column

- The Attendance link is only available in List view

- If the scheduled offering has multiple segments, select Copy to Same Day Segments to copy the attendance record

Slide 44: Record Attendance

Demonstration: Segments

Slide 45: Demonstration: Segments

Demonstration: Segments

1. Log in to the VA TMS.
2. Verify that the **Admin** tab is selected.
3. Select the **Learning** tab.
4. Select **Scheduled Offerings** tab on the left-hand side of the screen.
5. Search for and select a scheduled offering.
6. Now that the scheduled offering record is displayed, let's discuss the Segment areas.

Assigning Instructors

Once the instructor is identified, he or she can be assigned to the segment(s) within a scheduled offering. To do that, select **Segments**, select **Add New Segments**, and then select **Add Instructor** from the drop-down menu. The VA TMS returns all instructors in the search results. The search results include a column that displays the resource availability, which can help when determining the segment resource allocation:

- Not Available
- Available for entire scheduled offering
- Available for current segment
- Blank (when segment information is not available)

NOTE: The search for authorized instructors is an option per Item—so it's not necessary to clear out the item information from the filter if you want to search for an instructor who is not specifically authorized to teach this item. To perform "search and select" search filters, select the **Search** tab, enter your search criteria, then select **Search**.

Assigning Locations

When the training location has been identified, you can assign it to the segment(s) within a scheduled offering. To assign locations to segments, select **Add New Segments**, **Add Resources** then **Add Location** from the drop-down menu. The VA TMS returns all locations in the search results.

Assigning Equipment

Equipment is any reusable resource that is used in the delivery of scheduled offerings. These include overhead projectors, television monitors, classroom laptops, etc. Equipment can be associated with locations and facilities. You may schedule equipment that does not come with the location that has been scheduled. To schedule these additional resources, select the **Add Resources** button for the segment in which you want to schedule them.

Resource Conflicts

If you select a resource that is already scheduled for the same time in which you are trying to schedule it, a warning message displays. You can view the conflict and make a decision to continue and schedule that resource or search for and select another.

Apply to All Segments

In **Edit Segment**, you can add all of the resources that will be needed to deliver the segment. You can also select **Apply to All Segments** to copy the resources that you have applied to the segment that you're modifying to all other segments of the scheduled offering. Then select **Save & Close**.

Additional Segments

Once a scheduled offering is created, you have the ability to add or remove segments from that scheduled offering. The default segment structure is established through the Segments tab of the item record. You can add a new segment to the scheduled offering by either selecting the **Add New Segments** button or by selecting the **Copy Segments** icon. The Copy Segments icon is only available in list view.